

Department of Health Services, RFP # 1677-DLTC-PM
TPA Training & Technical Assistance Plan

The master agreement requires that each TPA prepare and maintain a training plan to address participating organization training and service provider training.

This document outlines the master agreement standards for preparing the plan and providing training. The training plan must be submitted to DHS for pre-approval with each participating agreement.

The TPA and/or participating organization may determine additional or modified training plans and delivery is necessary, in which case the training plan would be modified to reflect the additional or changed requirements and submitted to DHS with the participating agreement for approval.

The components of the plan must be documented and submitted with each participating agreement.

Required components of the plan:

Training Needs Assessment:

- Identification of training plan requirements based on the review of the following:
 - TPA functional services
 - Participating organization interaction/interfacing with the TPA system
 - Participating organization workflow changes, resulting from implementation of the master or participating agreement
 - Participating organization data and report requirements
 - DHS training requirements
 - Documentation of service providers' training requirements, by service provider type if appropriate
- Identification of TPA and customer training participants and their skill levels:
 - TPA implementation support staff
 - TPA operations staff
 - Business Associate staff
 - Participating organization management staff overviews
 - Contract management process support
 - Financial management process support
 - Communication plan stakeholders
 - Participating organization trainers/system users
 - Participating organization IT staff
 - DHS staff
 - Service provider staff, by service provider type if appropriate

Materials development plan:

- Workflow documentation
- Operations manual development/updates
- Other training materials, as necessary
- Training evaluation forms

Functional Training Categories:

- Review of Operations Manual
- System and Security administration
- HIPAA privacy, security and other regulatory requirements
- Enrollment/disenrollment processes
- Pre-authorization processes
 - Coding and changes
 - Submission/correction processing
- Provider record set-up/maintenance processes
- Provider claims submission processes
- Claims adjudication processes
 - Adjustment processes
 - Problem resolution processes
- Encounter data reporting processes
- Provider customer service processes
- Complaint and grievance processes
- Fraud & abuse processes
- System upload/download processes
- System output
 - Reports, EOBs, Extracts
- Data access
- Application release training plans
- Other participating organization-specific contracted services

Training methodologies (e.g., classroom, web cast, self study)

Training assessment methodologies

- Plans for remedial training, if need is demonstrated

Training schedule:

- Pre-implementation training
 - Train the trainer or training of participating organization training/implementation/system support staff – no later than 1 month prior to implementation.
 - General user training
- Refresher training – post implementation offered once per year

Technical support plans

- For participating organizations
- For service providers